Medicaid Management Information Systems

Maine Integrated Health Management Solution
Trading Partner Guide for Clearinghouses

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By accessing the Maine Health PAS Online Portal, all users agree to protect the privacy and security of the data contained within as required by law. Access to information on this site is only allowed for necessary business reasons, and is restricted to those persons with a valid user name and password.

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1. Introduction

This *Trading Partner Guide for Clearinghouses* describes several processes that will be useful to clearinghouses that want to register as trading partners. The following sections contain a list of the information needed before starting the registration process, as well as a detailed description of how to complete each of the registration steps.

If the user is not a clearinghouse that wants to register as a trading partner, refer to the appropriate document in the Trading Partner Guides repository on the MIHMS Health PAS Online Portal (online portal).

2. Information Needed

Before registering as a trading partner, make sure that the following information is readily available:

- Tax ID of the Clearinghouse.
- Name, business address, business telephone number, and email address for the person who is completing the trading partner registration. (This information is used to create the main trading partner account for the clearinghouse.)
- (Optional) The names and email addresses of additional people to affiliate to the main trading partner account as representatives of the clearinghouse. Representatives may be additional parties who work for the clearinghouse that may have an interest in such activities as maintaining the clearinghouse's account as business needs change.

NOTE: *This information is used to create the trading partner account for the clearinghouse.*

3. System Requirements

To successfully use all features of the online portal, ensure that computer systems meet the following minimum requirements:

- Reliable online connection
- Web browser – The latest version of Microsoft Internet Explorer is recommended. As new versions of Internet Explorer become available it is recommended that these versions are used.
- The latest version of Adobe Acrobat Reader

4. Complete the Registration Steps

4.1 Choose the Trading Partner Registration Link

Click the **Register** link to access the first Trading Partner registration page. The link is located on the left side of the online portal Provider page, see **Figure 4-1** below:

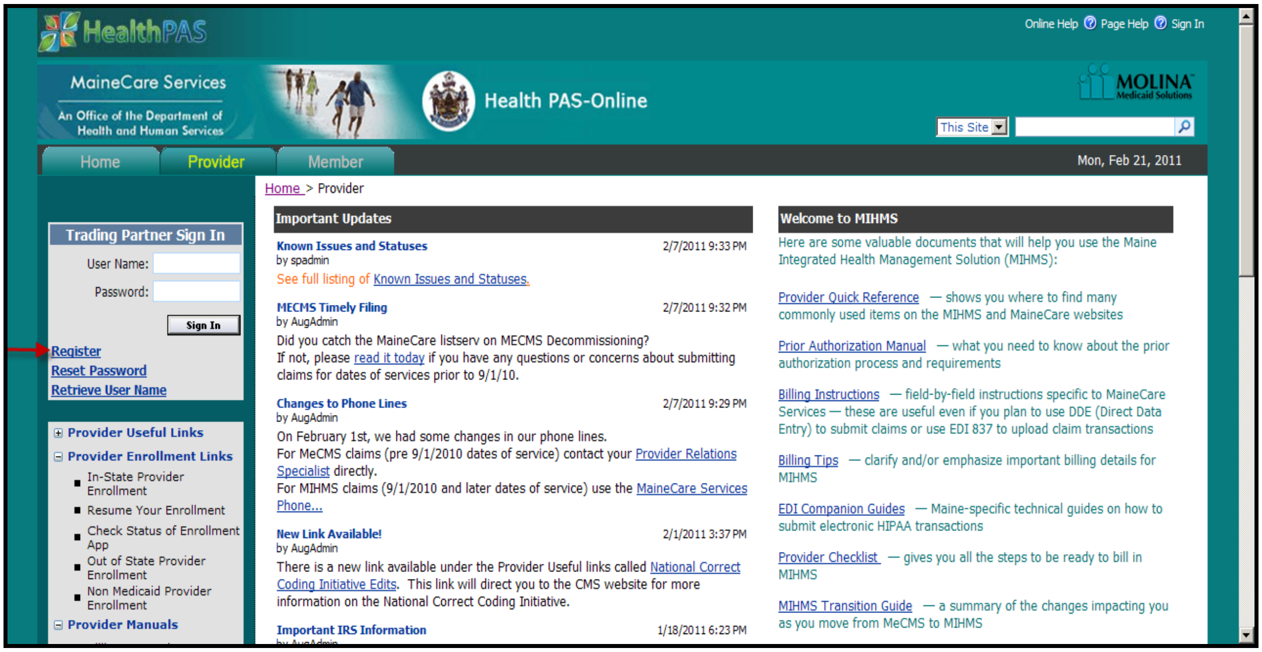

Figure 4-1: Trading Partner Registration

4.2 Provide Demographics Information

The first trading partner window is shown below in **Figure 4-2**. On this window, first select the Clearinghouse type of trading partner from the drop down menu.

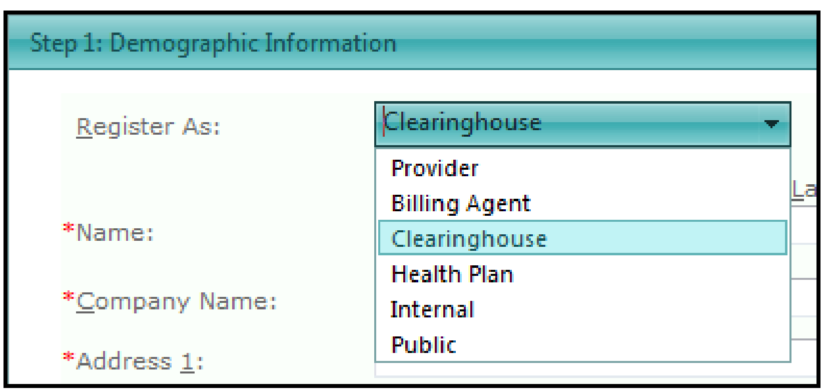

Figure 4-2: Register As

To complete the demographics window, follow the steps below, see **Figure 4-3** below:

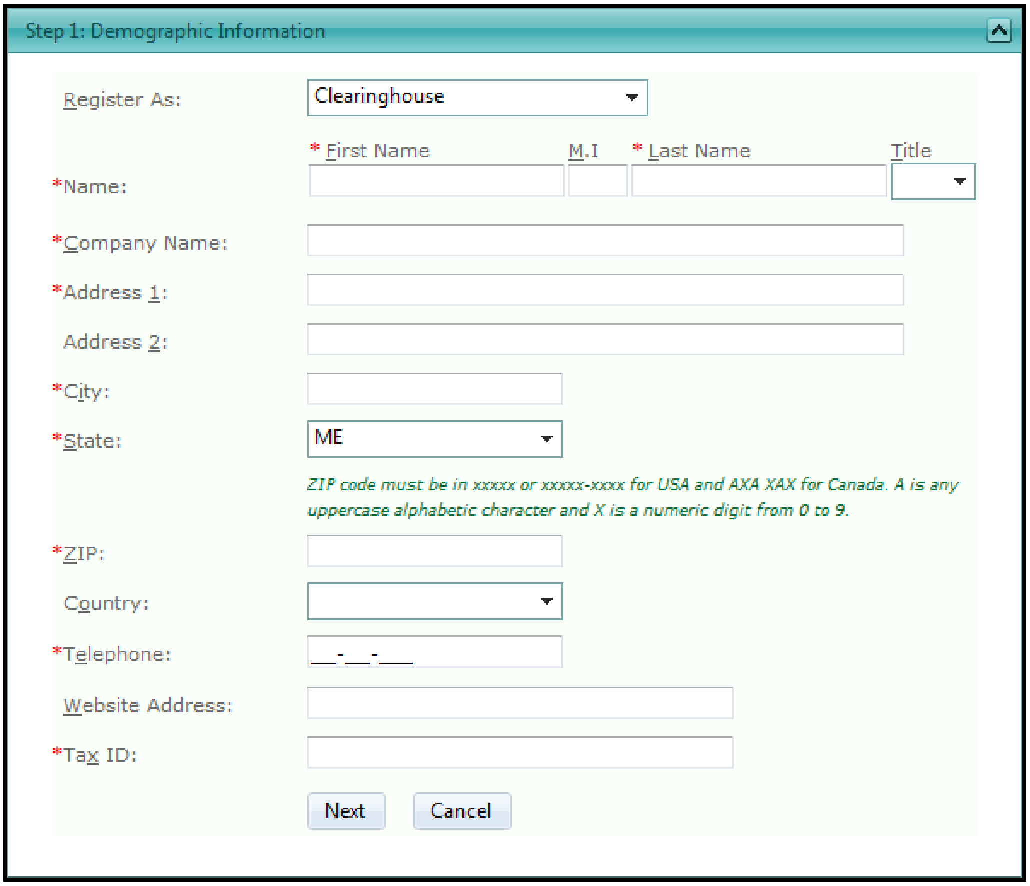

Figure 4-3: Demographics Information

1. In the Name fields, indicate the name of the person completing this registration. First and last names are required, the middle initial and title are optional.
2. In the Company Name field, indicate the company name. This is a required field.
3. In the Address 1 field, indicate the first line of the business address. This is a required field.
4. In the Address 2 field, indicate the second line of the business address. This is an optional field.
5. In the City, State, and ZIP fields, indicate the appropriate information for the business address. These fields are required.
6. In the Country field, indicate the country of the business. This is an optional field.
7. In the Telephone fields, provide the business phone number, including area code. This is a required field.
8. Indicate the website address (URL) for the business. This is an optional field.
9. In the Tax ID field, indicate the clearinghouse's tax ID (FEIN or SSN). This is a required field.
10. Complete one of the following:
    - To continue to the next step in the registration process, click the **Next** button. Proceed to Section **4.3: Specify Security Information**.
    - To cancel the registration, click the **Cancel** button.

4.3 Specify Security Information

On the second window create a user name, password, and security question and answer. Specify a valid email address.

The Security Information window appears as shown in **Figure 4-4** below:

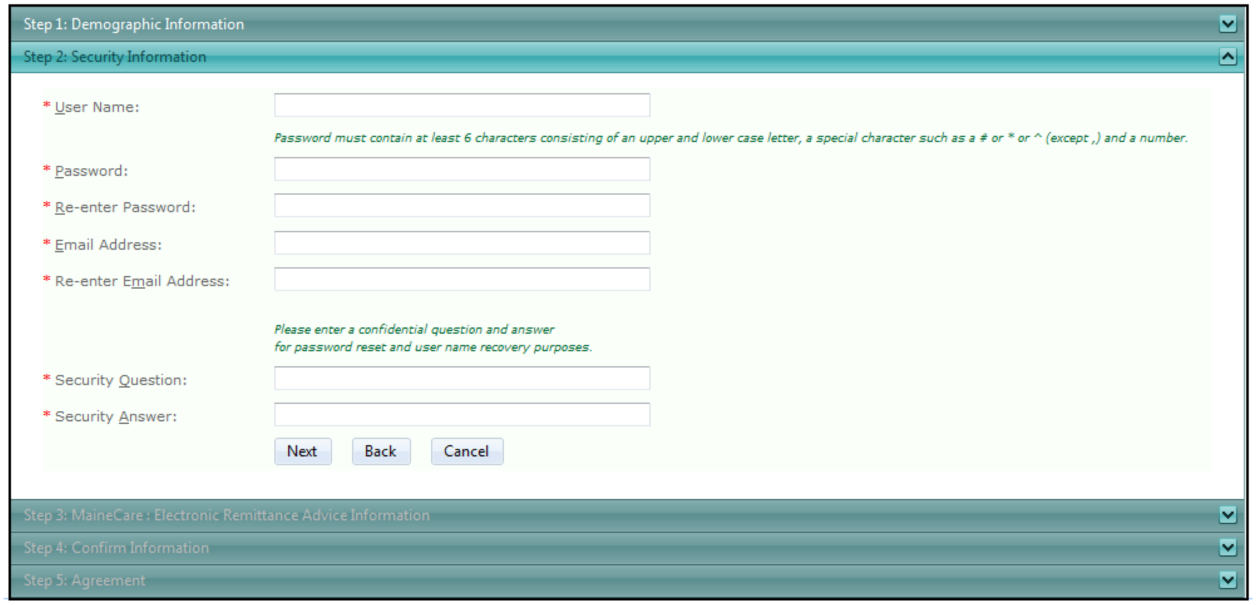

Figure 4-4: Security Information

To complete the Security window, follow the steps below:

1. In the User Name field, type a user ID.
2. In the Password field, type a password. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk "**∗**") and a number. The password may not contain spaces.
3. In the Re-Enter Password field, retype the password exactly as typed in the Password field.
4. In the Email Address field, type a valid email address. (A confirmation email is sent to this address, so it is important that the address is valid.)
5. In the Re-Enter Email Address field, retype the email address exactly as typed in the previous field.
6. In the Security Question and Answer fields, make up and type a confidential question and its answer, respectively. (For example, "What street did I live on as a child?" or "What was the make of my first car?") If a password is forgotten this question and answer pair is used to verify the user's identity.

***NOTE**: All fields are required.*

7. Complete one of the following:
   - To continue to the next step in the registration process, click the **Next** button. Proceed to Section **4.4: Confirm Information**.
   - To return to the previous registration step, click the **Back** button. Refer to Section **4.3: Specify Security Information**, for instructions.
   - To cancel the registration, click the **Cancel** button.

4.4 Confirm Information

After completing the Security Information window, click the **Next** button, the Confirm Information window appears, as shown in **Figure 4-5** below:

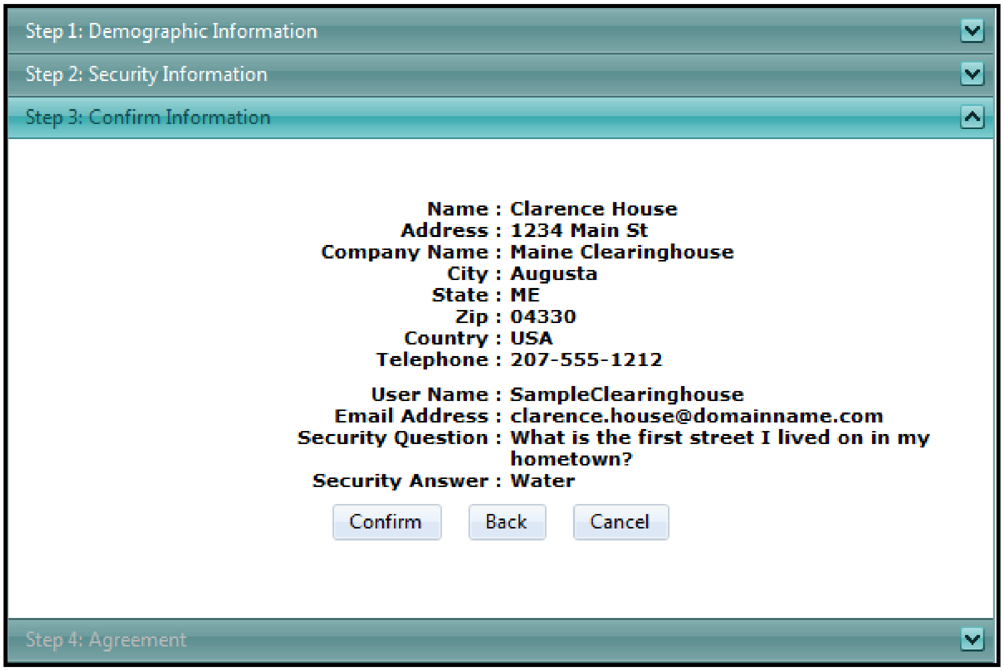

Figure 4-5: Confirm Information

Verify that all information displayed on this window is accurate. If anything is incorrect, click the **Back** button to go back to the window where the information was originally entered, correct the field, and click the **Next** button until reaching the Confirm Information window again.

After verifying the accuracy of the information on this window, complete one of the following:

- To continue to the next step in the registration process, click the **Confirm** button. Proceed to Section **4.5: Sign the Agreement Electronically**.
- To return to the previous registration step, click the **Back** button. Refer to Section **4.3: Specify Security Information**, for instructions.
- To cancel the registration, click the **Cancel** button.

4.5 Sign the Agreement Electronically

After confirming the information, the Electronic Signature window appears, as shown in **Figure 4-5** below:

Figure 4-6: Electronic Signature

On the Electronic Signature window, the Trading Partner Agreement is displayed. Be sure to read the agreement. To agree to the terms and conditions of the Agreement, click the **checkbox** below it that indicates "**Yes, I agree to the above terms and conditions**".

To sign the Agreement, type the first and last names entered on the Demographics Information window (Step 1/5) in Section **4.2: Provide Demographics Information**, exactly as they appear there. Then, complete one of the following:

- To print the trading partner agreement, click the **Print** link that is located below the right side of the agreement window. This could be useful to facilitate any reviews of the agreement.
- To complete the registration process, click the **Register** button. Proceed to Section **4.6: Activate Account**.
- To go back to the Confirm Information window, click the **Back** button. Refer to Section **4.4: Confirm Information**, for instructions.
- To cancel registration, click the **Cancel** button.

4.6 Activate Account

After signing the Trading Partner Agreement and clicking the **Register** button, the Registration window appears, as shown in **Figure 4-7** below:

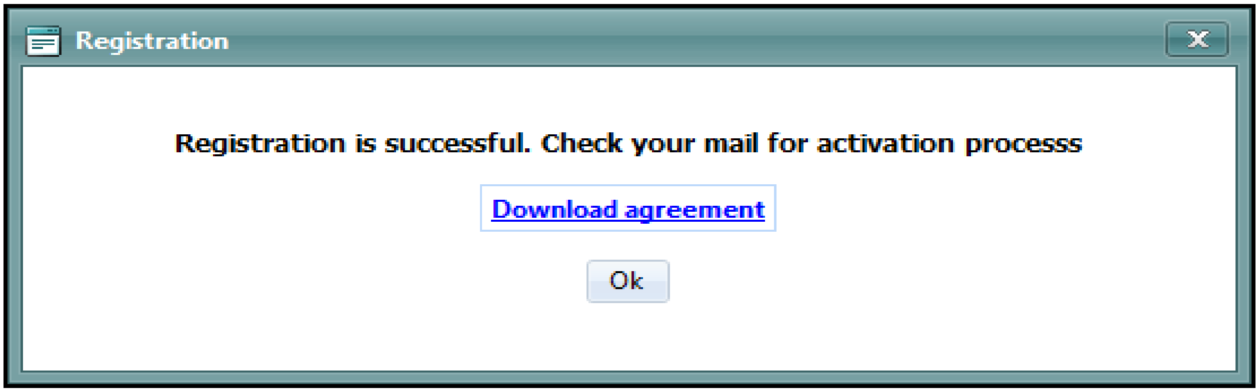

Figure 4-7: Registration

A pdf version of the TPA can be downloaded by selecting the **Download agreement** link. Select the **Ok** button to complete registration. After account activation, a confirmation email with the trading partner ID (TPID) is sent to the address specified during the registration process.

5. Trading Partner Login

Once the account is activated, log in to the secure trading partner features by entering the user name and password in the online portal Provider page fields, see **Figure 5-1** below, and then click the **Sign In** button.

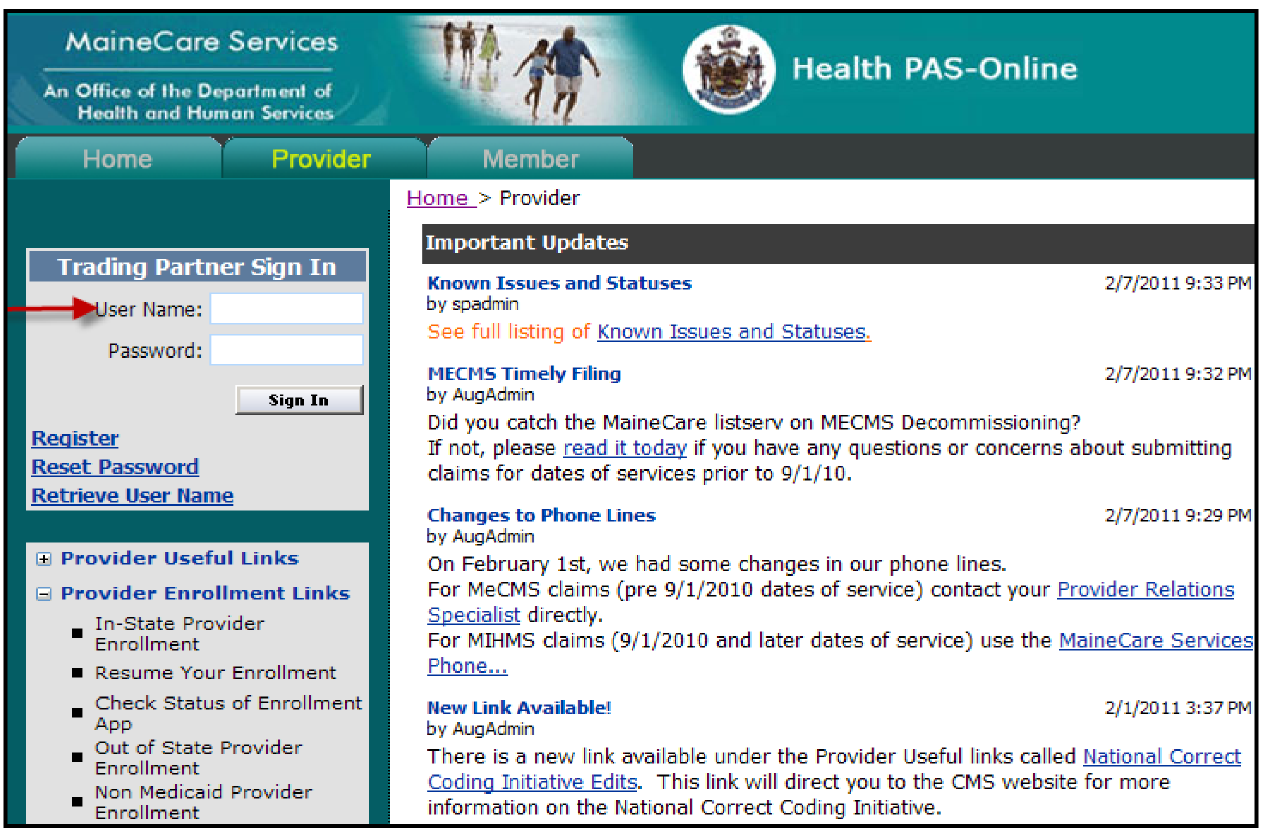

Figure 5-1: User Name and Password

The Welcome to Trading Partner window appears, as shown in **Figure 5-2** below:

Figure 5-2: Welcome to Trading Partner

6. Trading Partner Logoff

When logged in as a trading partner, the top status bar changes to indicate both the trading partner ID (TPID) and the user name for the person that is currently logged in. See sample status bar in **Figure 6-1** below:

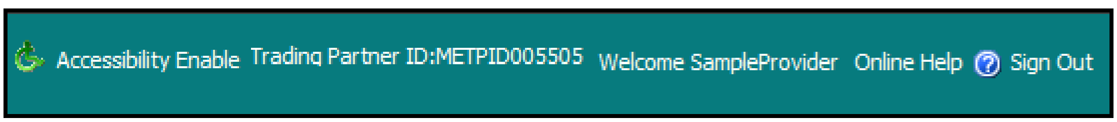

Figure 6-1: Trading Partner ID and User Name

To log off from the online portal, click the **Sign Out** link in the status bar.

7. Account Maintenance

7.1 Password Reset Overview

For additional security, users are required to change the password for the trading partner log in every 60 days. The user name does not change, but the password must be changed. If the password is not changed, after 60 days the user is prompted to reset the password at the next sign in.

If the password for the trading partner user name needs to be reset the following methods are used:

- If the current password is known, it is reset using the Account Maintenance feature. This method is described in Section **7.2: Resetting When the Current Password is Known**.
- If the current password is not known, it is reset from the online portal Provider page. This method is described in Section **7.3: Resetting When the Current Password is Not Known**.

7.2 Resetting When the Current Password is Known

If the current password for the trading partner user name is known, sign in to the online portal. The online portal displays the Welcome to Trading Partner window, as shown in **Figure 7-1** below:

Figure 7-1: Welcome to Trading Partner

1. From the menu at left, select the **Account Maintenance** link to expand the list. From the expanded list, select the **Reset Password** link. The Reset Password window appears, as shown in **Figure 7-2** below:

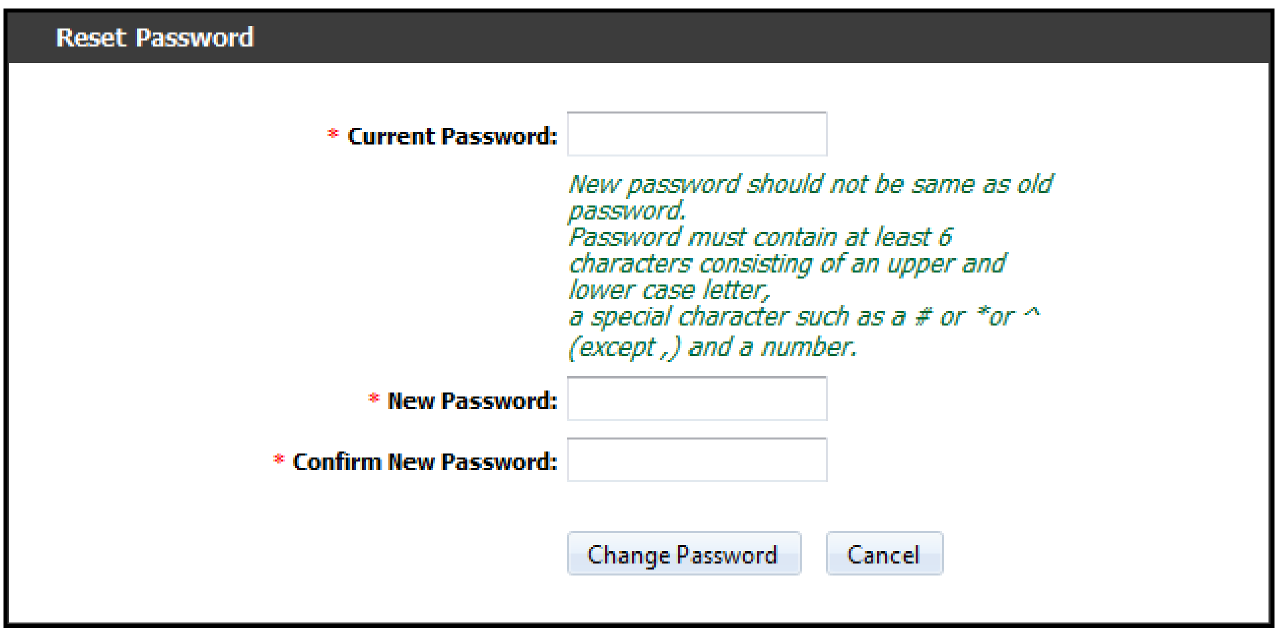

Figure 7-2: Reset Password

2. To reset the password, follow the steps below:
   a. In the Current Password field, specify current password.

b. In the New Password field, type a different password that follows the password guidelines. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk "*") and a number. The password may not contain spaces.
c. In the Confirm New Password field, retype the password exactly as typed in the New Password field.
d. Click the Change Password button. The online portal displays a confirmation message, as shown in **Figure 7-3** below:

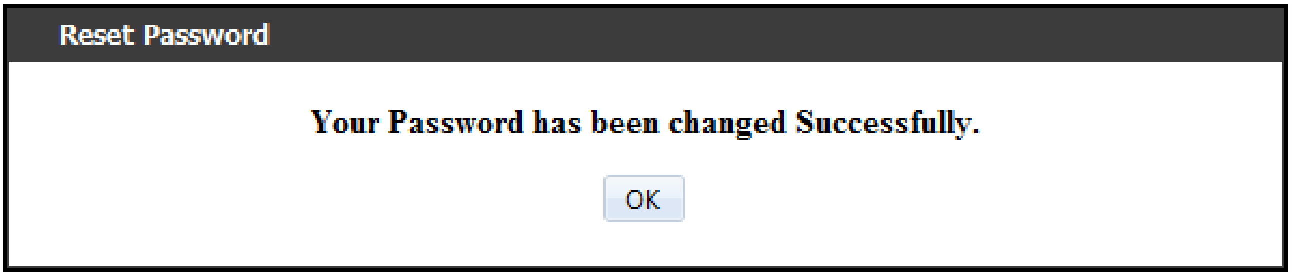

Figure 7-3: Confirmation Message

3. Click **OK** to continue. The online portal returns to the Welcome to Trading Partner window.

7.3 Resetting When the Current Password is Not Known

If the current password is forgotten or lost for the trading partner user name, it is reset from the online portal Provider page. To begin, choose the **Reset Password** link, as shown in **Figure 7-4** below:

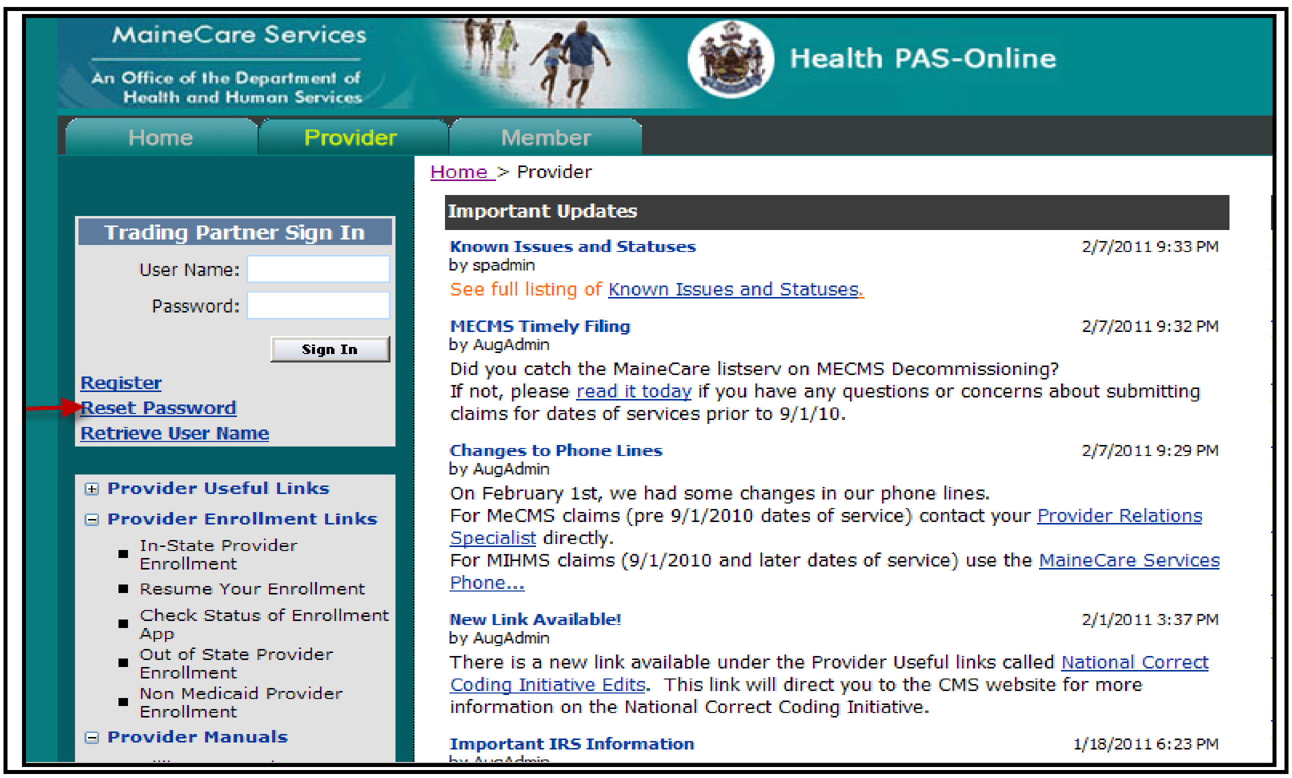

Figure 7-4: Reset Password Link

1. The online portal displays the Trading Partner Reset Password window, as shown in **Figure 7-5** below:

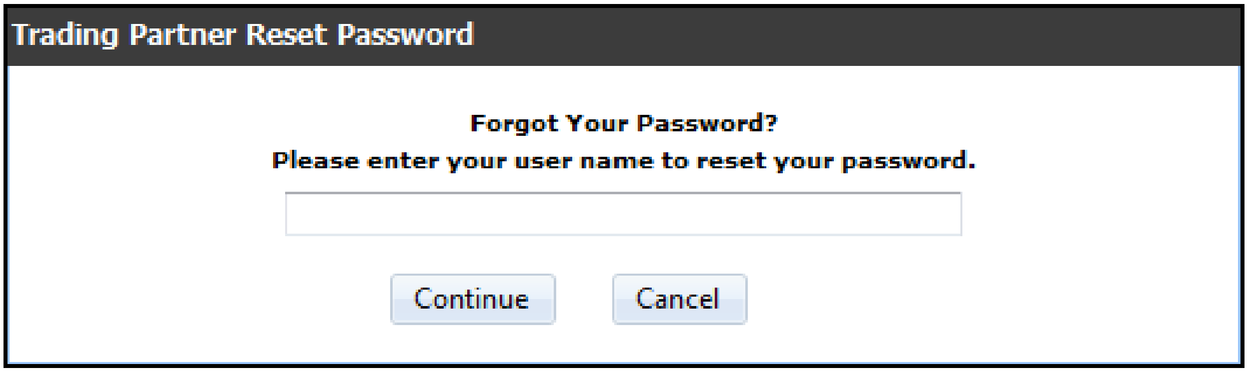

Figure 7-5: Trading Partner Reset Password

2. Specify trading partner user name in the box and click the **Continue** button.
3. The online portal displays the email address and security question associated with this user name, as shown in **Figure 7-6** below:

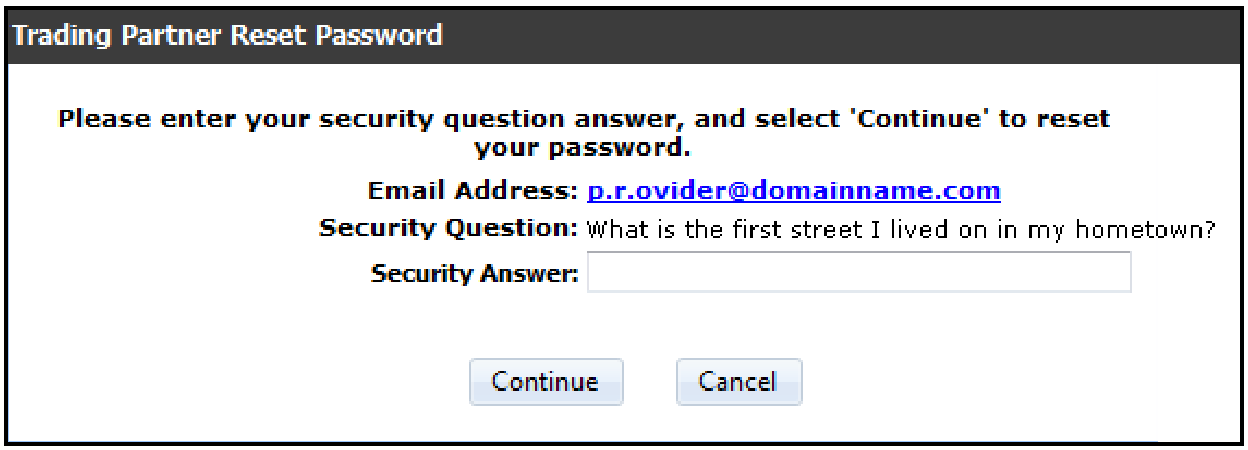

Figure 7-6: Email Address and Security Q&A

4. Type the answer to the security question in the Security Answer box and click the **Continue** button. If the question is answered successfully the online portal sends an email to the address associated with the user name and displays the confirmation message shown in **Figure 7-7** below:

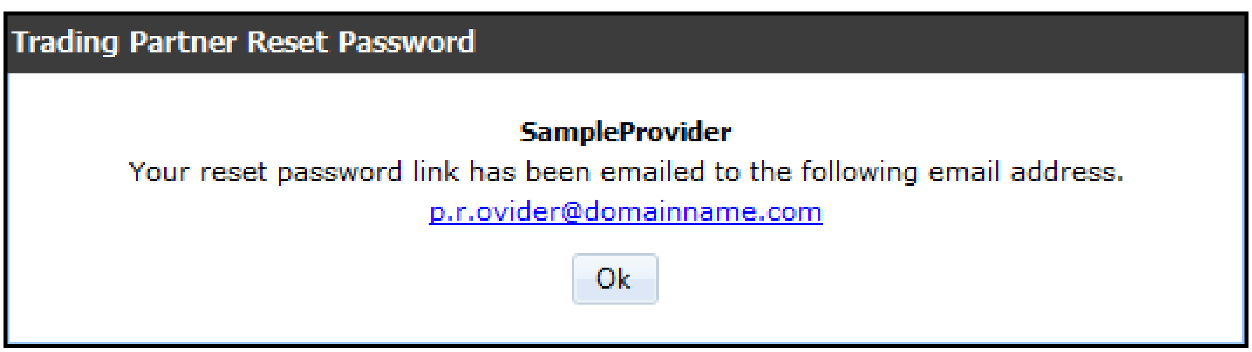

Figure 7-7: Confirmation of Password

5. The email contains a confirmation link and activation PIN. After receiving the email, click the link (or copy it and paste it into the address bar of a web browser). The online portal displays the Change Password window with the user name and activation PIN already filled in, as shown in **Figure 7-8** below:

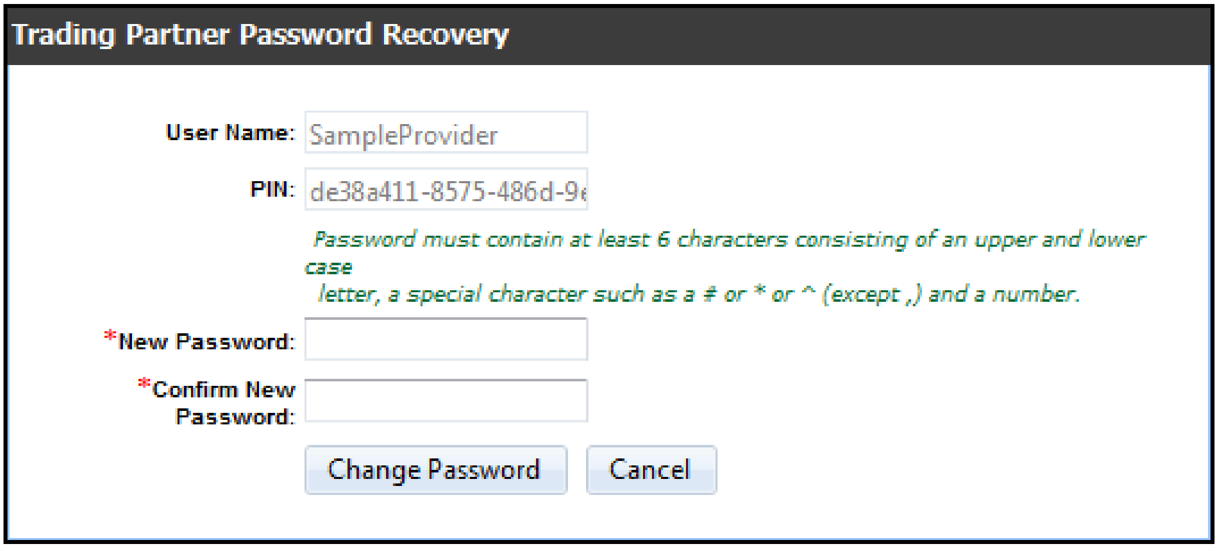

Figure 7-8: Change Password

6. To complete the Change Password window, follow the steps below:
    a. In the New Password field, type a password that follows the password guidelines. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk "∗") and a number. The password may not contain spaces.
    b. In the Confirm New Password field, retype the password exactly as typed in the New Password field.
    c. Click the **Change Password** button. The online portal displays a confirmation message, as shown in **Figure 7-9** below:

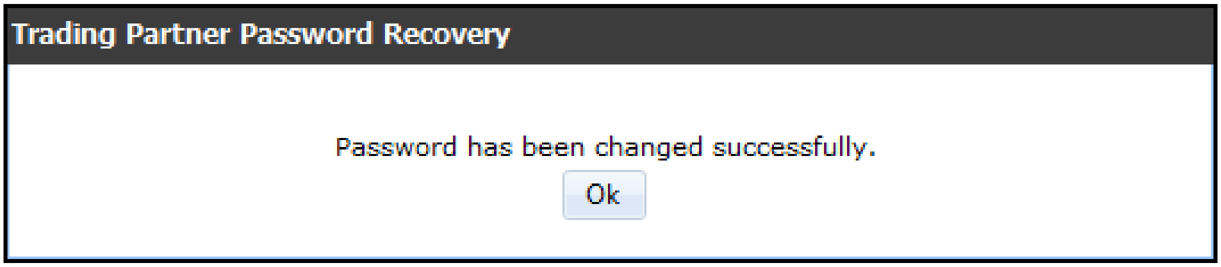

Figure 7-9: Password Reset

7.4 User Name Retrieval

If the trading partner user name is forgotten it is retrieved using the Retrieve User Name link on the online portal Provider page, see **Figure 7-10** below:

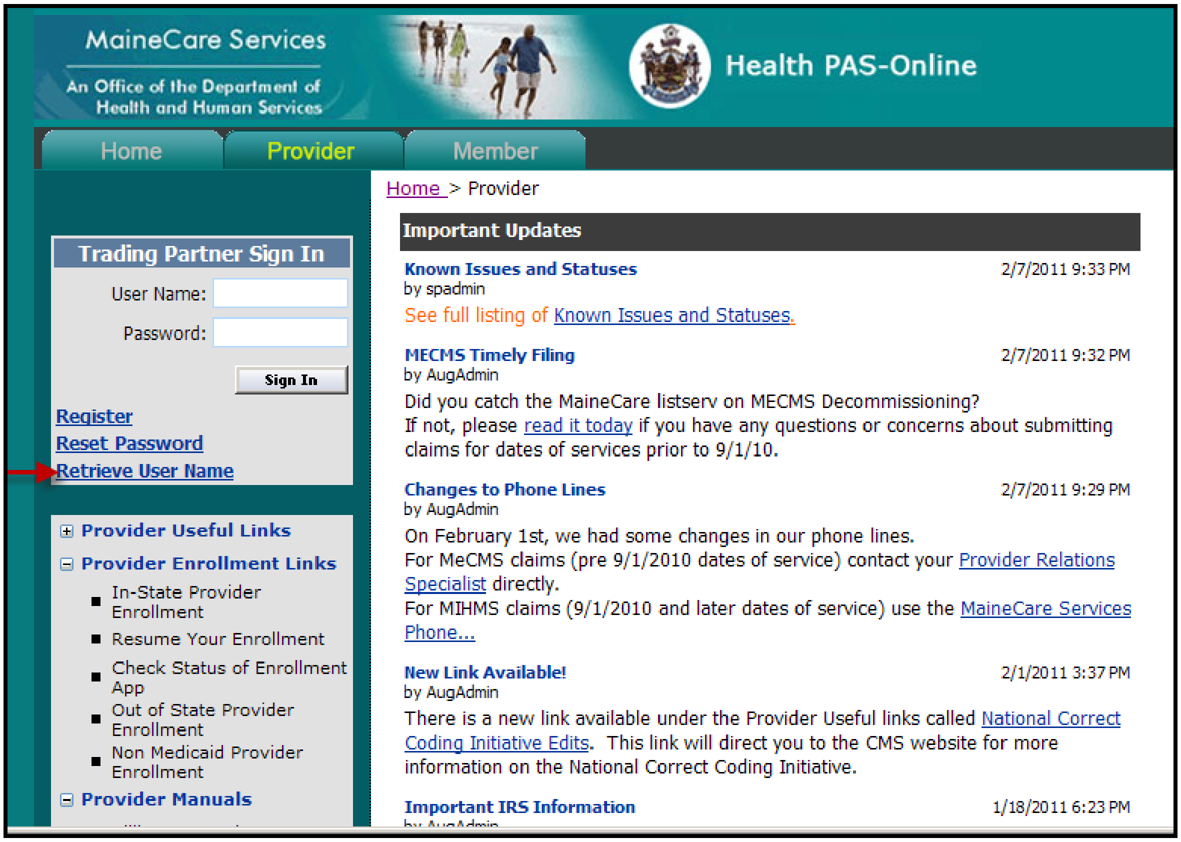

Figure 7-10: Retrieve User Name Link

1. After clicking the link, the online portal displays the Retrieve User Name window, as shown in **Figure 7-11** below:

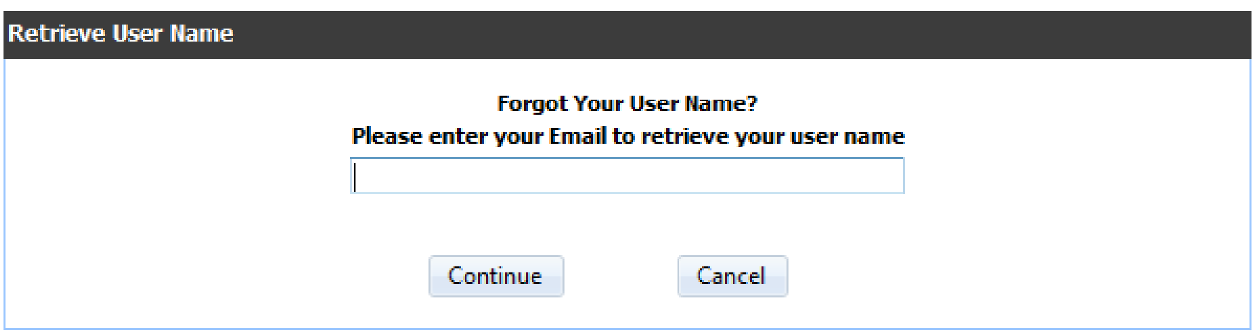

Figure 7-11: Email Specification for User Name Retrieval

2. Type the email address for the user name to retrieve. Click the **Continue** button.
3. If the email address entered is associated to multiple trading partner accounts, the online portal will display an error, as shown in **Figure 7-12** below. (If the email address is associated to only one trading partner account, the online portal will not show this error.)

Figure 7-12: Multiple Accounts Error

4. If this error appears enter the trading partner ID in the field provided. (This number was emailed to the user when the trading partner account was created. It is the same number that is used as the sender ID for X12 submissions.) Click the **Continue** button.

NOTE*: If the trading partner ID is not known call the number listed in the error message for additional assistance.*

5. After entering the email address (and trading partner ID, if needed) click the **Continue** button, the online portal displays the email address and security question, as shown in **Figure 7-13** below:

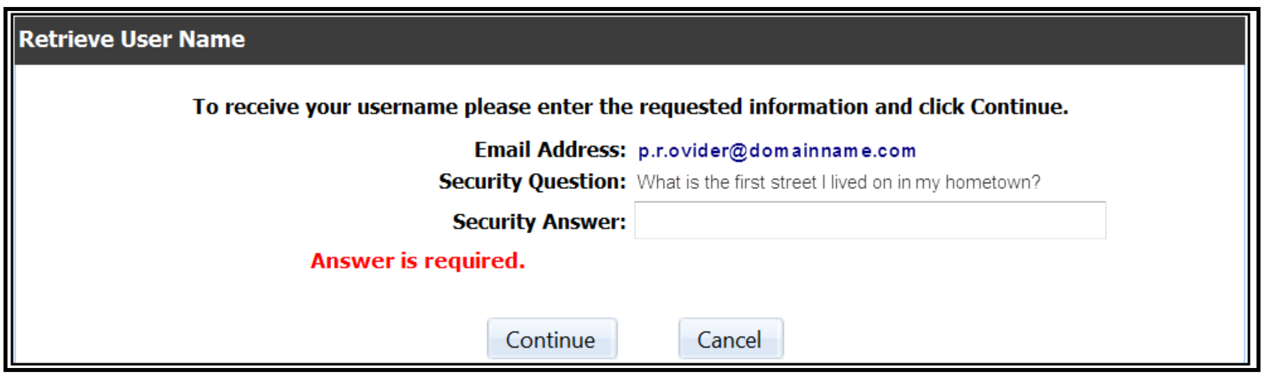

Figure 7-13: Email Address and Security Q&A

6. Type the answer to the security question in the Security Answer box and click the **Continue** button. If the question is successfully answered the online portal sends an email to the address associated with the user name and displays the confirmation message shown in **Figure 7-14** below:

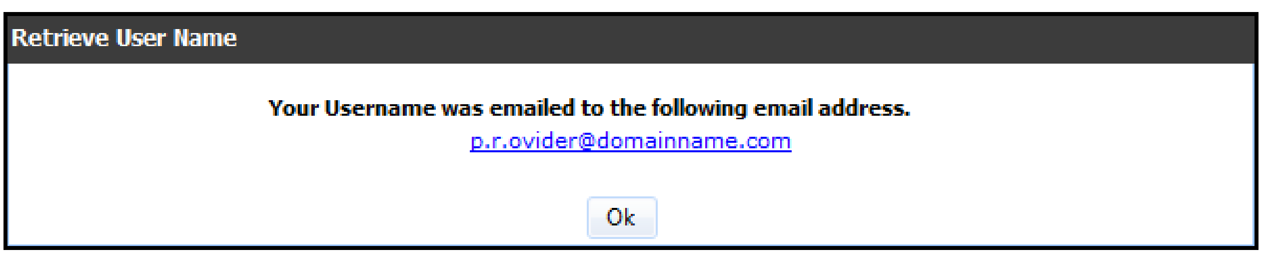

Figure 7-14: Confirmation Message for User Name Retrieval

7. Click **Ok**. The email contains the user name and trading partner ID.

8. User Maintenance

8.1 Manage Users

8.1.1 Adding Users

Use the Manage Users link to grant new users access to the clearinghouse's trading partner account.

1. Sign in to the secure Trading Partner area on the online portal Provider page.
2. On the Welcome to Trading Partner window, expand the **Account Maintenance** link in the far left column.
3. Choose the **Manage Users** link as shown in **Figure 8-1** below:

Figure 8-1: Account Maintenance

4. Click the **Add User** button, as shown in **Figure 8-2** below:

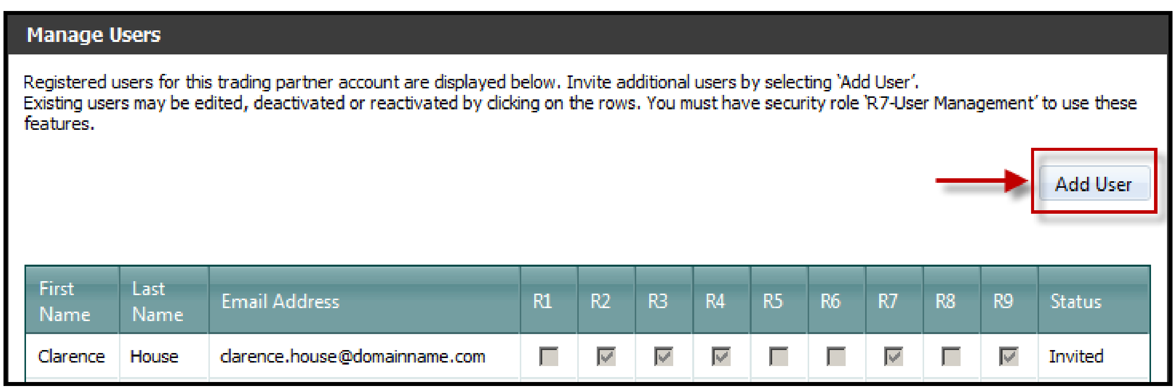

Figure 8-2: Add User

5. The Manage Users window updates to display the fields needed to invite an additional user and specify their permissions, as shown in **Figure 8-3** below:

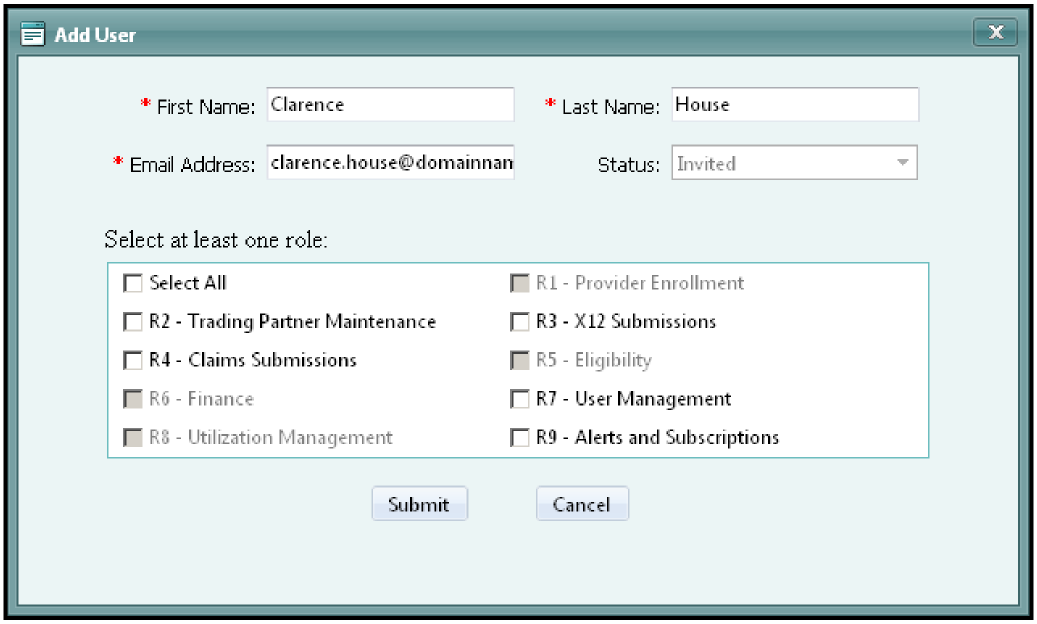

Figure 8-3: Permission Fields

6. To complete the fields, follow these steps:
   a. Specify the invited user's first and last names in the First Name and Last Name fields, respectively. These are required fields.
   b. In the Email Address field, specify the invited user's email address. This is a required field.
   c. Select at least one permission for the invited user. (Selections can be modified later to give users any number or combination of permissions as business needs change. Please see Section **8.1.2: Trading Partner Permission Codes** for a more detailed description of the powers allowed by each permission.)

7. Click the **Submit** button. The online portal sends an email invitation to the specified user. The Manage Users window displays the invited user's name, email address, and permissions, as shown in **Figure 8-4** below:

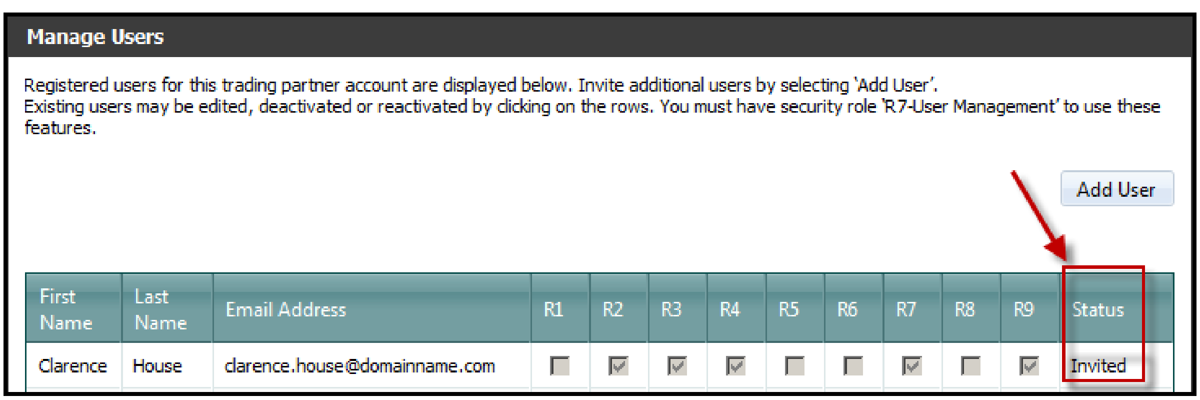

Figure 8-4: Invited Users

In order for the invited user to activate their account, they must follow the steps described in Section **8.1.3: (Invited Users Only) Activating a Trading Partner Representative Account**.

8. To invite additional users, repeat the process described in steps 4 through 7 above.

8.1.2 Trading Partner Permission Codes

Though each user on trading partner account must have at least one permission, any combination of the permissions are available to assign. Please find in this section a table listing all permission codes and another detailing the powers that each code grants to users, see **Table 1** and **Table 2** below:

Table 1: Trading Partner Permission Codes & Descriptions

Requires TPA	Code	Trading Partner User Access Area	User Powers*
Y	**R1**	Provider Enrollment Maintenance	Provider account maintenance
Y	**R2**	Trading Partner Maintenance	Account maintenance including provider associations and demographics updates (Clearinghouses do not require provider associations)
Y	**R3**	X12 EDI Transactions	File Exchange (X12), and report access
Y	**R4**	Claim Submission, Claim Status	Access Remittance Advice (PDF) and reports, claim submission, claim status, patient roster and primary care roster
Y	**R5**	Eligibility Verification	Eligibility verification, patient roster and primary care roster
Y	**R6**	Payment Status	Provider payment status
Y	**R7**	User Management	Manage account users
Y	**R8**	Referral Submission & Status, Authorization Submission & Status	Authorization submission, authorization status, patient roster, primary care roster, referral submission and referral status
Y	**R9**	Alerts and Subscriptions	EDI Gateway alerts and subscriptions– these advise trading partners when they have a X.12 (825, 271, RA etc.) response awaiting collection.
* All codes grant personal password reset powers.			

Not all powers are available to every type of trading partner account. For the list of the powers available to users for clearinghouse trading partner accounts, refer to **Table 2** below.

Table 2: Clearinghouse User Powers Grid

Requires TPA	Menu Item	Health PAS Online User Access*	Clearinghouse
	Account Maintenance		**Access Rights**
Y	Manage Users	R7	X
Y	Provider Associations	R2	
Y	Rest Password	All	X
Y	Update Demographics	R2	X
Y	File Exchange (X12)	R3	X
Y	Remittance Advice (PDF)	R4	X
Y	Other Reports	All	X
Y	Alerts and Subscriptions	R9	X
	Form Entry		**Access Rights**
Y	Authorization Submission	R8	
Y	Authorization Status	R8	
Y	Claim Submission	R4	
Y	Claim Status	R4	
Y	Eligibility Information	R5	
Y	Patient Roster	R4, R5, R8	
Y	Primary Care Roster	R4, R5, R8	
Y	Provider Payment Status	R6	
Y	Referral Submission	R8	
Y	Referral Status	R8	
	Provider Enrollment		**Access Rights**
Y	Provider Maintenance	R1	

8.1.3 (Invited Users Only) Activating a Trading Partner Representative Account

When a user is invited to create a trading partner representative account an email is sent that contains an activation link. The invited user should click this link to begin their enrollment process. An example of the Trading Partner Representative Registration window appears in **Figure 8-5** below:

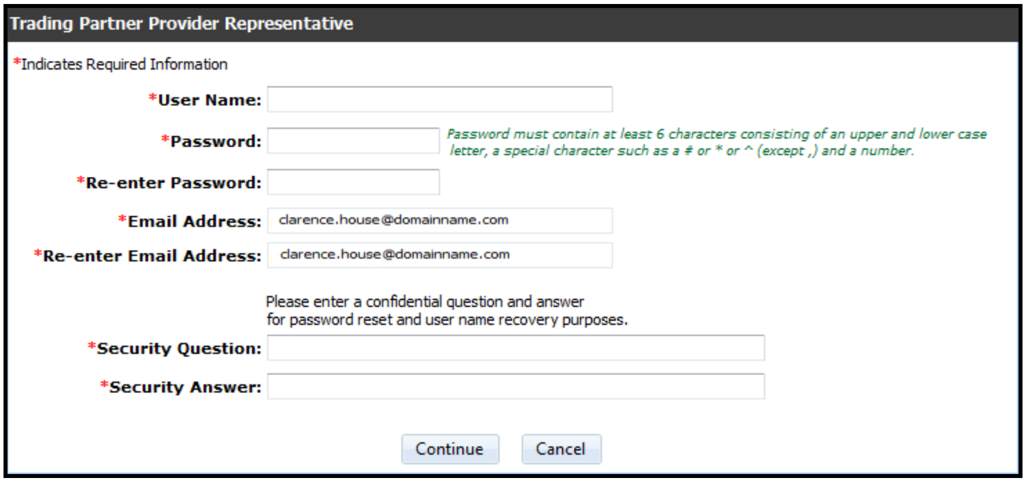

Figure 8-5: Trading Partner Registration

To complete this window, follow these steps:

1. In the User Name field, type a user ID.
2. In the Password field, type a password. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk "**∗**") and a number. The password may not contain spaces.
3. In the Re-Enter Password field, retype the password exactly as typed in the Password field.
4. The Email Address field will be auto-populated. Verify this information is accurate.
5. The Re-Enter Email Address field will be auto-populated. Verify this information is accurate..
6. In the Security Question and Answer fields, make up and type a confidential question and its answer, respectively. (For example, "What street did I live on as a child?" or "What was the make of my first car?") If a password is forgotten this question and answer pair is used to verify the user's identity.

***NOTE**: All fields are required.*

7. Click the **Continue** button. The online portal creates the user name and password as specified. (To log in to the secure trading partner feature, the invited user will use this information in the User Name and Password fields on the online portal Provider page. Refer to Section **5: Trading Partner Login** for more information about logging in to the online portal.

8.1.4 Modifying User Permissions

To modify the permissions granted to a provider representative a user must have R7 (User Management) permission for the trading partner account. Follow the steps below:

1. Sign in to the secure trading partner area on the online portal Provider page.
2. On the Welcome to Trading Partner window, expand the **User Maintenance** link in the far left column.

3. Choose the **Manage Users** link. The online portal displays the initial Manage Users window, as shown in **Figure 8-6** below:

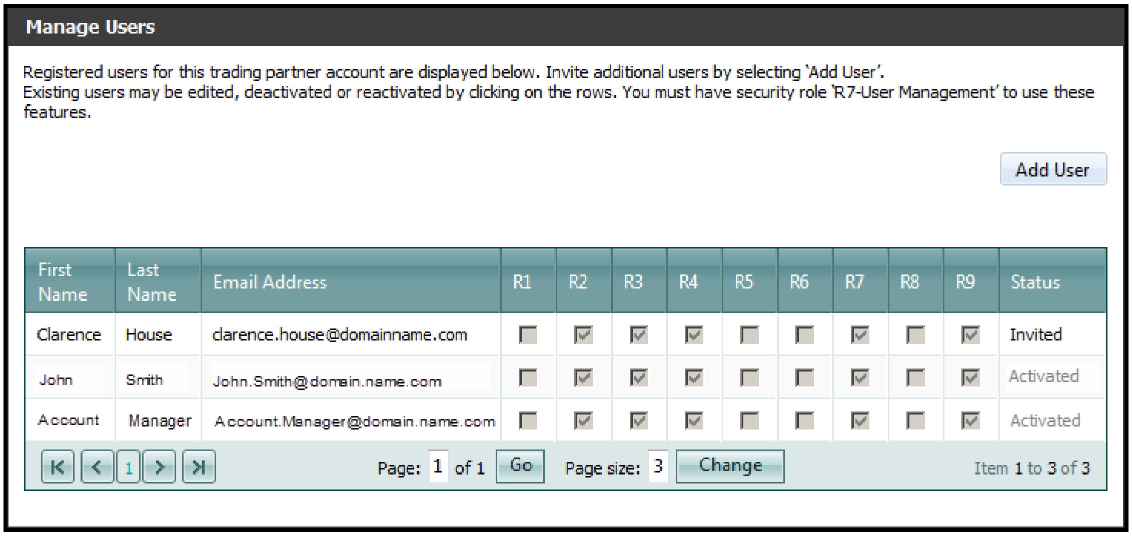

Figure 8-6: Manage Users

4. Click **anywhere on the row** of the user whose permissions need to be modified. The Manage Users window expands to show identification, status, and permissions fields for the user selected.

5. Modify the information as necessary, see **Figure 8-7** below:

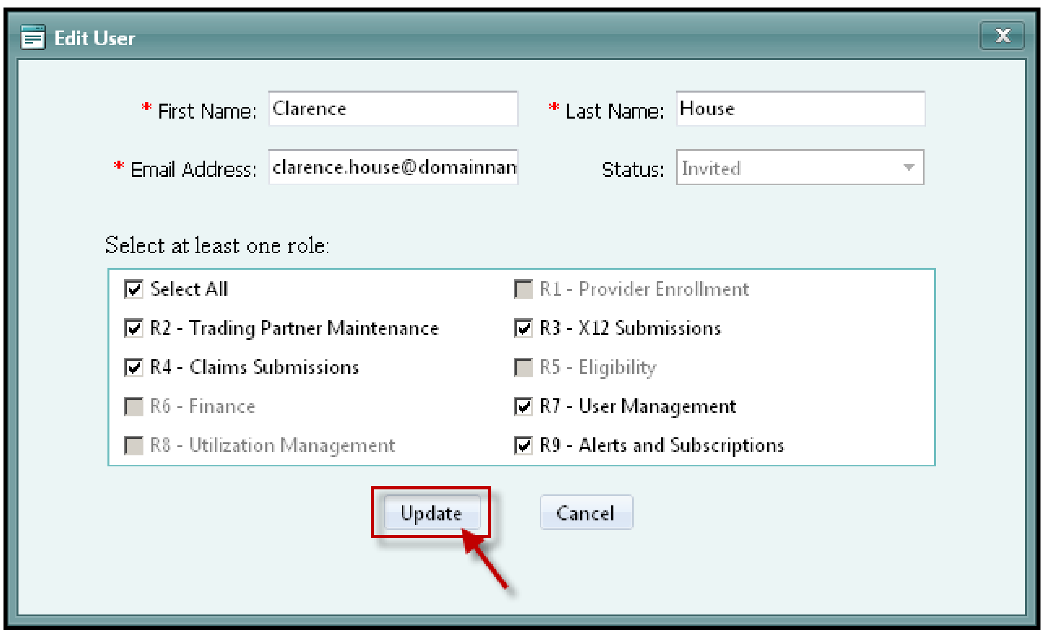

Figure 8-7: Manage Users with Additional Permissions

6. Click the **Update** button. The online portal saves the changes and refreshes the window to show the user list with the modified permissions, as shown in **Figure 8-8** below:

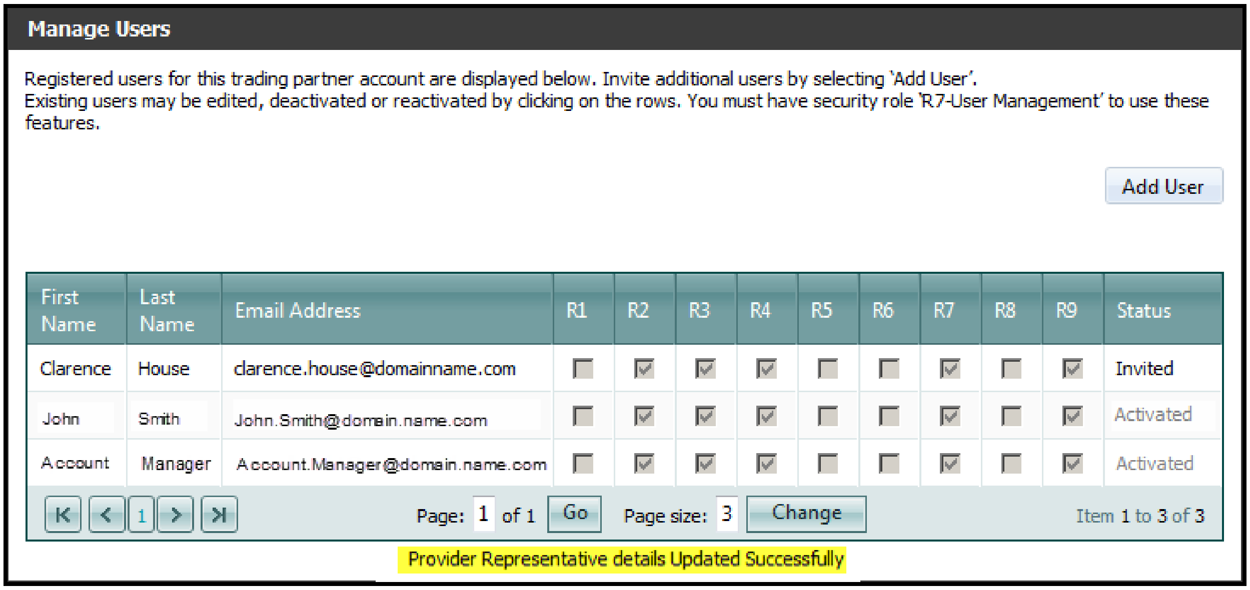

Figure 8-8: User List with Modified Permissions